

# Initial Rosters Upload

You're on your way to entering data!

When setting up your community in CLI Engage, note that the first users who will need access to the system include principals, teachers, and students. The following information details the various tools that can be used to upload, enter, and manage users.

The Initial Rosters Upload can be found under the Data Management tab and should be used by communities (e.g., school districts) who have a centralized data management system and/or who have identified personnel who will manage the entire community's data upload. The Initial Rosters Upload is appropriate for use only during the creation of your community.

The Bulk Add/Update feature allows you to manually enter multiple teachers and students through an online portal. This tool may be appropriate for principals and teachers who are entering or updating their own rosters. The Bulk/Add Update feature for students can be found under the Class Roster Management tab, and the feature for teachers can be found under the User Management tab (click on Teacher).

The Add/Manage features under the Data Management tab can be used to add and invite higher level leadership (such as community district users, community district specialists, school specialists, and principals). It can also be used to make edits to any existing users within your community.

This How-to Guide covers the Initial Roster Upload. For information on the other data management features, visit [www.texasschoolready.org/help-new](http://www.texasschoolready.org/help-new).

## Step 1: Creating Your Data File

The Initial Rosters Upload Tool on CLI Engage uses a Roster Template to create the following:

- Students
- Classes
- Teachers

The template can be used to create many student class rosters for a single or multiple schools from the same Community or District. The template is an Excel file that has to have some specific column headings and must stay in the exact order. There are two tabs at the foot of the template: **Data** and **Instructions**.

As some data fields require information to be entered in a very specific format, for example, Gender, Ethnicity, phone numbers, etc., this process is designed for users with advanced level computer and Excel skills.

## Important Considerations

You will see that some columns and fields are optional; however, even if not used, these columns and fields must stay in the file in the exact same position otherwise CLI Engage will not process the file.

1. DO NOT DELETE any optional column that is not used.
2. DO NOT CHANGE the order of any columns.

The names and ID numbers of all Texas schools were uploaded to our database from different sources such as TEA, DFPS, etc. We will provide you with a list of your schools as they are named in CLI Engage; the school name and internal ID number must match with our database to prevent the duplication of records. For example, CLI Engage will not recognize that Bush Elementary is the same as G. Bush EL.

In compliance with HIPAA and FERPA data protection, no rosters or student information should be sent via email.

## Understanding the Template

The column headings have the following properties:

Column A: Action – Required - Each row must have the letter “I” (upper case i) as it will be used to “INSERT” or create a Student record.

Columns B, C, D, E: Community and School Name and Internal ID – Required - The Community and School Name and Internal IDs must match the naming convention and ID number in the CLI Engage data base. **Please note that if your Community and School Internal IDs begin with a zero you must add an apostrophe before the first zero i.e. if your Community ID is 012345 you must enter '012345, in order for excel to accept the initial zero.**

- If you are a Public School District or Charter School, the term “Community” means “District”. Your Community –or District- and School Internal ID Numbers have been assigned by TEA.
- If you are a Head Start Agency, the term “Community” means “Head Start Agency”. Your schools will have a number that is stored under the Internal ID number field that may have been issued by your agency or assigned by CLI Engage.
- If you are a Child Care operation, your DFPS License number is stored under the Internal ID number field.

Depending on your CLI Engage account type, you can find the names and numbers used in CLI Engage by consulting the Community and School pages under the Administrative area. You can contact CLI Engage and request the list of school names and numbers assigned to your sites.

Columns F, H: Teacher First and Last Name – Required - Enter only the name of the homeroom teacher, only one teacher per class.

CLI Engage allows you to assign an existing class to additional teachers. The Data Process tool will create duplicate students if the same student appears in more than 1 row. Use the legal name as shown on your official records.

Column G: Teacher Middle Name – Optional - Middle Name or Middle Initial can be entered.

Column I: Teacher Internal ID – Required - Enter the ID number assigned by the employer. This number is very important as the system will use it to find an existing teacher in the system to prevent duplication of accounts and classes.

Column J: Teacher Phone Number – Optional - Provide a valid phone number to contact the Teacher. Enter number as 111-111-1111.

Column K: Teacher Phone Type – Optional Enter Work, Cell or Home.

Column L: Teacher Primary Email - Required - Every Teacher should use an individual email address. It is strongly recommended that teachers use their work email address (i.e. name@the-isd.org;name@the-ESC.net).

Due to privacy issues and UT Health policy regarding the use of IT resources, no user should use a generic email address (i.e., info@mySchool.edu).

CLI Engage will send a personal “invitation” to the user’s email address linked to a specific profile and class. The user will click the link in the email invitation to log into CLI Engage with a Google Account. Users can use an existing Google Account or create a new one. Users do not have to obtain a new Gmail account; instead, they can create a Google Account with their existing email address.

Column M: Class Day Type - Required - Enter Full Day, AM or PM.

If a Teacher has an AM and a PM class, at the same or at different schools, CLI Engage will create only one user account if the same name email and ID number are used. The Teacher will have access to both classes using the same login credentials.

Column N: Class Level - Required - Enter PK or K.

Columns O, Q: Student First and Last Name - Required - Use the Student legal name as shown on your official records.

Column P: Student Middle Name - Optional - Middle Name or Middle Initial can be entered.

Column R: Student Internal ID - Optional - Enter the Student ID number given by your organization. This number is used by CLI Engage to prevent duplications. DO NOT enter Social Security Numbers.

Column S: Student TSDS ID - Optional - Only for Public and Charter Schools. If available, enter the TSDS number. This number can be entered or updated at a later date and may help you agency match your CLI Engage reports with other databases.

Column T: Student Grade Level: - Required - Enter PK or K.

Column U: Student Assessment Language: - Optional/Assignable - Enter English, Spanish or Bilingual.

This value relates to the CIRCLE Progress Monitoring, and determines if the Student will be given only the English assessment, only the Spanish assessment, or both English and Spanish assessments (Bilingual). If this information is unknown and field is left blank, the system will auto-assign “Bilingual” (both English

and Spanish). The value can be later changed or the Teacher can “Exclude” students from an assessment measure on any language.

Column V: Student Birth Date: - Required - Enter date as M/D/YYYY . This information is required as the CIRCLE Progress Monitoring assessment determines benchmarks according to different age groups (3.5 to 3.9 years old, 4.0 to 4.5, and 4.5 and older).

Column W: Student Gender - Optional - Enter Male or Female

Column X: Student Ethnicity - Optional - Available options: African American Alaskan Asian Hispanic Indian Multiracial Native American White Unknown Other


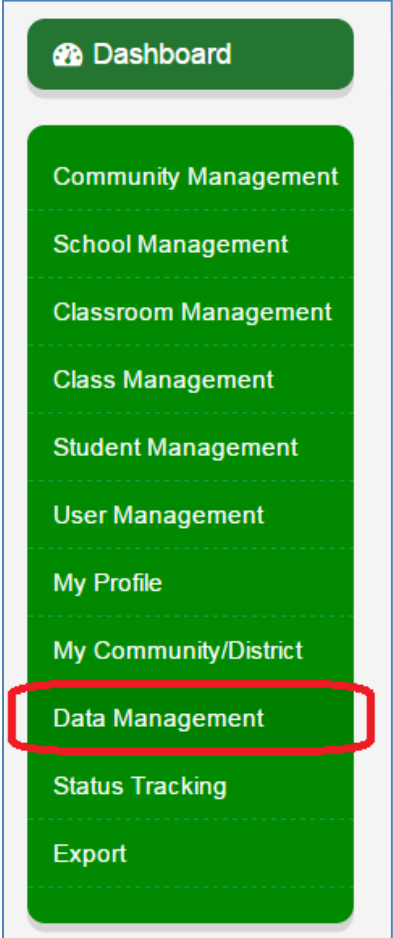
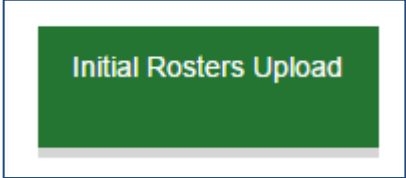
## Column Headings

Index	Column	Existing Field	Field Type	Values
1	A	Action	Required	I (upper case “i”)
2	B	Community_Name	Required	Should match in Engage
3	C	Community_Internal_ID	Required	Should match in Engage
4	D	School_Name	Required	Should match in Engage
5	E	School_Internal_ID	Required	Should match in Engage
6	F	Teacher_First_Name	Required	Legal Name
7	G	Teacher_Middle_Name	Optional	Legal Name or Initial
8	H	Teacher_Last_Name	Required	Legal Name
9	I	Teacher_Internal_ID	Required	Alphanumeric
10	J	Teacher_Phone_Number	Optional	111-111-1111
11	K	Teacher_Phone_Type	Optional	Work; Cell; Home
12	L	Teacher_Primary_Email	Required	Personal work email
13	M	Class_Day_Type	Required	Full Day; AM; PM
14	N	Class_Level	Required	PK; K
15	O	Student_First_Name	Required	Legal Name
16	P	Student_Middle_Name	Optional	Legal Name or Initial
17	Q	Student_Last_Name	Required	Legal Name
18	R	Student_Internal_ID	Optional	Alphanumeric
19	S	Student_TSDS_ID	Optional	From District
20	T	Student_Grade_Level	Required	PK; K
21	U	Student_Assessment_Language	Optional/Assignable	English; Spanish; Bilingual
22	V	Student_Birth_Date	Required	M/D/YYYY
23	W	Student_Gender	Optional	Male; Female
24	X	Student_Ethnicity	Optional	Unknown; African American; Alaskan; Native American; Indian; Asian; Caucasian; Hispanic; Multiracial; Other

## Step 2: Initial Rosters Upload

The Initial Rosters Upload tool in CLI Engage allows communities to upload all of their students, classes, classrooms, and teachers in a single upload file.

Before following the steps in this document, first create your Engage Initial Roster Upload file following the steps listed above. Name your upload file [CommunityName]\_[YourInitials]\_DDMMYY and save to your desktop.


1. A blue rectangular button with a gear icon on the left and the text "Administrative Class and Student Management" on the right.
2. A vertical green sidebar menu. At the top is a "Dashboard" button with a globe icon. Below it is a list of menu items: "Community Management", "School Management", "Classroom Management", "Class Management", "Student Management", "User Management", "My Profile", "My Community/District", "Data Management", "Status Tracking", and "Export". The "Data Management" item is highlighted with a red rectangular border.
3. A green rectangular button with the text "Initial Rosters Upload" in white.

4.

Data Management > Initial Rosters Upload

[Back to Data Management](#)

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\* Community/District:  **ADRIAN ISD**  **Begin typing the name of your community in the search box. Select your community from the drop down.**

\* Data File(Excel):  No file chosen [Initial Rosters Template.xlsx](#)  
The maximum records are 10,000.

\* Send Invitation: ☒ Send ☐ Not Now

5.

Data Management > Initial Rosters Upload

[Back to Data Management](#)

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\* Community/District:

\* Data File(Excel):  No file chosen [Initial Rosters Template.xlsx](#)  
The maximum records are 10,000.

\* Send Invitation: ☒ Send ☐ Not Now

6.

Data Management > Initial Rosters Upload

[Back to Data Management](#)

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\* Community/District:

\* Data File(Excel):  AdrianISD\_Init...s\_090115.xlsx [Initial Rosters Template.xlsx](#)  
The maximum records are 10,000.

\* Send Invitation: ☒ Send ☐ Not Now

## Initial Rosters Upload

7.

Data Management > Initial Rosters Upload

[Back to Data Management](#)

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\* Community/District:


\* Data File(Excel):  No file chosen [Initial Rosters Template.xlsx](#)  
The maximum records are 10,000.

\* Send Invitation: ☒ Send ☐ Not Now


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Process Data

Batch#	# of Records	School			Teacher			Student			File Name	Date	Status	Invitation	Action
		Total	Success	Fail	Total	Success	Fail	Total	Success	Fail					
1007	20	1	0	0	2	0	0	20	0	0	AdrianISD_InitialRosterTemplate_ AliceWatkins_090115.xlsx	09/01/2015	Pending	true	 



8.



Are you sure you want to process the data?

Notice: If Yes, the data will begin processing. Please check the results here shortly.

Your data will be uploaded to CLI Engage once the Status changes from Processing to Processed in the list. Check the Class, Student, User, and other Management tabs in the Administrative section of Engage to ensure your data has uploaded correctly.

Status
Processing
Processed